

COMMERCE SMALL PURCHASES SYSTEM (CSPS)
PROCUREMENT DESK PROCEDURES

**20. Set Up/Maintain Standard Document
Clauses and Line Notes**

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|-------------|-----------------------------------|---|
| 20.1 | Introduction | This procedure describes how to set up and maintain the standard document clauses and line notes that print on the purchase order (i.e., the CD-404). The standard document clause and line note information is entered via the CSPS “Standard Document Clauses and Line Notes Screen” (PR007). |
| 20.2 | Who Performs the Procedure | Designated procurement personnel will be responsible for entering and maintaining the document clause and line note information. |
| 20.3 | Initiating the Process | Document clause and line note information is entered when new clauses/line notes need to be established or existing clauses/line notes need to be changed. |
| 20.4 | Accessing the System | From the Main Menu, select Maintenance. From the Maintenance menu, select Procurement. From the Procurement menu, select “PR007 - Standard Clauses and Notes”. Follow the steps below for PR007. |

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- 20.5 Creating a New Clause or Line Note** This procedure describes the steps necessary to create and activate a new clause or line note.

PR007 - Standard Document Clauses and Line Notes Screen

LINE NOTE	FLAG Clause Default	SHORT DESCRIPTION	ACTIVE?	STAT DATE
CSPS	<input checked="" type="checkbox"/>	CSPS TEST CLAUSE	<input checked="" type="checkbox"/>	01-FEB-1999
50.204.98	<input checked="" type="checkbox"/>	TESTING	<input type="checkbox"/>	30-JAN-1997
50.205.506	<input checked="" type="checkbox"/>	ASA	<input type="checkbox"/>	30-JAN-1997
50.205.987	<input checked="" type="checkbox"/>	AASDSO	<input checked="" type="checkbox"/>	31-JAN-1997
52.20.1.2	<input checked="" type="checkbox"/>		<input type="checkbox"/>	30-JAN-1997
52.202-1	<input type="checkbox"/>	DEFINITIONS-ALTERNATE 1 (APR 84)	<input checked="" type="checkbox"/>	27-DEC-1996
52.203-1	<input type="checkbox"/>	OFFICIALS NOT TO BENEFIT (APR 84)	<input type="checkbox"/>	06-NOV-1995
52.203-3	<input checked="" type="checkbox"/>	GRATUITIES (APR 84)	<input checked="" type="checkbox"/>	06-NOV-1995
52.203-5	<input checked="" type="checkbox"/>	COVENANT AGAINST CONTINGENT FEES (API	<input checked="" type="checkbox"/>	18-FEB-1999
52.203-6	<input checked="" type="checkbox"/>	RESTRICTIONS ON SUBCONTRACTOR SALES	<input checked="" type="checkbox"/>	06-NOV-1995
52.203.8	<input type="checkbox"/>		<input type="checkbox"/>	30-JAN-1997
52.209.3	<input type="checkbox"/>		<input type="checkbox"/>	30-JAN-1997
52.210-5	<input checked="" type="checkbox"/>	NEW MATERIALS (APR 84)	<input checked="" type="checkbox"/>	06-NOV-1995
52.212-2	<input checked="" type="checkbox"/>	TEST LINE NOTE	<input checked="" type="checkbox"/>	17-OCT-1996
52.212-9	<input checked="" type="checkbox"/>	VARIATION IN QUANTITY (APR 84) (PERMISSI	<input checked="" type="checkbox"/>	06-NOV-1995

Long Description Under no circumstances will the contract re

STEP	ACTION
1.	Click the "Create Record" icon in the toolbar (i.e., the "green plus" icon). A blank record will be created.
2.	In the LINE NOTE field, input the necessary FAR clause, CAR clause, or line note. This field holds up to 30 characters.
3.	If the entry in the LINE NOTE field is a clause, either click the mouse or press the space bar to enter a check in the CLAUSE field. Otherwise, leave the field blank.

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STEP	ACTION
4.	<p>If the entry in the LINE NOTE field should print (by default) on every procurement document that is printed, click the mouse or press the space bar to enter a check in the DEFAULT field. Otherwise, leave the field blank.</p> <p>Note: If the default box is checked and the clause box is checked, the clause and the short description will automatically print when each purchase order is printed. If the default box is checked and the clause box is not checked, the record is considered to be a line note and the full text will print after the final line item. If the default box is unchecked, the user may manually select the clause or line note on FM041 for inclusion in a specific purchase order.</p>
5.	<p>In the SHORT DESCRIPTION field, enter a short description of the clause or line note. This field holds up to 80 characters of text.</p>
6.	<p>In the LONG DESCRIPTION field, enter the full text associated with the clause or line note if applicable. Access this field by double clicking in the LONG DESCRIPTION field. When all of the text has been entered, click "OK".</p>
7.	<p>In the ACTIVE field, click the field using the mouse or press the space bar to make the clause/line note active and available for use. If the clause or line note should be inactive, leave this field blank.</p>
8.	<p>The STAT DATE field reflects the date in which the record has been most recently activated or deactivated.</p>
8.	<p>Click the "Exit" icon on the toolbar to exit this screen.</p>

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- 20.6 Printing (Running) This procedure describes the steps necessary to run the**
the Document “PR711 - Document Clauses Report”.
Clauses Report

PR711 - Runtime Parameter Form (Document Clauses)

PR711: Runtime Parameter Form

File Edit Help

Previous Next Run Report Cancel

PR711

Standard Document Clauses and Line Notes

Enter values for the parameters below

Destination Preview

Note From ALL

To ALL

Default Flag (Y/N)
(Blank=don't care)

Active (Y/N)
(Blank=don't care)

Full Text Y

STEP	ACTION
1.	<p>To run the “PR711 - Document Clauses Report”,</p> <p>a. Click the “Printer” icon in the toolbar while the Standard Clauses and Line Notes Screen (PR007) window is open and active,</p> <p style="text-align: center;">or</p> <p>b. From the Main Menu, select Reports. From the Reports menu, select Procurement. From the Procurement menu, select “PR711 - Document Clauses”.</p>

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STEP	ACTION
PR711: Runtime Parameter Form	
2.	<p>To select the destination of the report, click the pull down menu in the DESTINATION field and select the appropriate destination:</p> <ul style="list-style-type: none"> a. To view the report on the screen, select "Screen". b. To send the report to a specific file, select "File". c. To send the report to the printer, select "Printer". d. To send the report to a mail file, select "Mail". e. To view the report on the screen, select "Preview". <p>After selecting the destination, go to Step 3.</p>
3.	<p>To narrow the range of generated clauses and line notes, use the NOTE FROM and TO pull down menus to select the applicable ranges.</p> <p>Note: These fields are not required. They will default to "All". If "All" is left as the selection for these fields, every clause and line note will be generated in the report.</p>
4.	<p>To generate reports that contain records with the default flag set to "Y", type a "Y" in the DEFAULT FLAG (Y/N) field.</p> <p>To generate reports that contain records with the default flag set to "N", type a "N" in the DEFAULT FLAG (Y/N) field.</p> <p>Note: This field is not required and will generated reports that contain records of both default flag types if it is left blank.</p>
5.	<p>To generate reports that contain records with the active flag set to "Y", type a "Y" in the ACTIVE (Y/N) field.</p> <p>To generate reports that contain records with the active flag set to "N", type a "N" in the ACTIVE (Y/N) field.</p> <p>Note: This field is not required and will generated reports that contain records of both active flag types if it is left blank.</p>
6.	<p>To generate reports that display the full description of the clause or line note, select "Y" from the FULL TEXT pull down menu.</p> <p>To generate reports that so not display the full description of the clause or line note, select "N" from the FULL TEXT pull down menu.</p> <p>Note: This field defaults to "Y".</p>

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STEP	ACTION
7.	Click the “RUN REPORT” pushbutton to execute the selection made. Proceed to Step 9.
8.	Click the “CANCEL” pushbutton to cancel the report selections made. Note: Upon clicking the “CANCEL” button the Runtime Parameter Form will close and exit the user to the last active screen.

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STEP	ACTION	
	IF...	THEN...
<p>9.</p>	<p>The destination selected is “Screen” or “Preview”...</p> <p>and</p> <p>The “RUN REPORT” pushbutton is clicked...</p>	<ul style="list-style-type: none"> a. To go to the next page of the report, click the “NEXT” pushbutton. b. To go to the previous page of the report, click the “PREV” pushbutton. c. To go to the last page of the report, click the “LAST” pushbutton. d. To go to the first page of the report, click the “FIRST” pushbutton. e. To go to a specific page of the report, enter the page number and then click the “PAGE” pushbutton. f. To print the report, click the “PRINT” pushbutton. g. To send the report to a mail file, click the “MAIL” pushbutton. This functionality is currently not available. h. To close the report, click the “CLOSE” pushbutton. i. To open a second report window, click the “NEW” pushbutton.